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Foreign Crops and MARKETS

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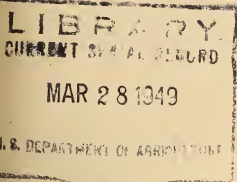


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FOR RELEASE

MONDAY

MARCH 14, 1949

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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

L A T E N E W S

Norwegian production of whale oil in the Antarctic as of February 13 was reported at 128,631 short tons compared with 118,792 tons as of February 15, 1948. About 17,500 tons of this season's production is sperm oil. There are 10 floating factories and 1 land station available this year, compared with 9 floating factories and 1 land station available last year.

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As a result of negotiations with a Soviet Union Trade Committee at Amsterdam, the Netherlands signed a contract in February for the purchase of 85,000 metric tons of Soviet wheat. The grain is to be delivered during February, March and April. Incidations are that the wheat is to be equivalent in quality to U.S. Hard Winter and that half of it is to be delivered on the basis of \$96 a metric ton, f.o.b. Black Sea and half on the basis of \$106 a metric ton, c.i.f. Rotterdam. The contract was made under the general terms of the trade agreement concluded between the Netherlands and the Soviet Union in 1948. (With the above contract, the total of the Soviet Union's sales or commitments of wheat to all countries from July 1, 1948 to date amounts to approximately 1,135,000 metric tons.)

(Continued on Page 224)

FOREIGN CROPS AND MARKETS

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REVIEW OF 1948 WORLD BREADGRAIN CROP

Latest revised estimates place the 1948 world breadgrain production at 239 million short tons, which would be slightly larger than the 1935-39 average and about 10 percent larger than in 1947, according to information available to the Office of Foreign Agricultural Relations. The wheat production was 6.4 billion bushels, compared with 5.8 billion bushels in 1947, and rye 1.7 billion bushels, compared with 1.5 billion.

Compared with the prewar (1935-39) period the slightly larger production of 1948 was due to the substantial increase in both acreage and yield of wheat in the United States. Some increase was also recorded for Australia and for the total production in Asia and Africa. In contrast, the other continental totals showed declines from the prewar level, especially those of Europe and the Soviet Union.

World rye production, though well above the small 1947 harvest was still below prewar in 1948. A substantial reduction in the European total more than offsets an estimated increase in the Soviet Union. These are, of course, the two important rye producing areas. The harvest was slightly below average in North America, the only other area of any significance in rye production.

Principal changes entering into the net increase from the earlier estimate are increased estimates for both wheat and rye in the Soviet Union. A moderate increase in the Australian wheat estimate was also indicated, as were slight increases for total production in North and South America. Partly offsetting these increases were reductions in the estimates for China, Turkey and India, which were the main changes involved in a net reduction of 28 million bushels in Asia's wheat total. (See Foreign Crops and Markets, November 29, for earlier estimates.)

Wheat production in North America is now estimated at 1,701 million bushels, only slightly below the record of 1,720 million in 1947. Though not up to that record crop, the harvest was about 55 percent larger than the 1935-39 average. Harvested acreage has increased by about 15 percent since the prewar period, but higher yields account for the bulk of the gain in production. Rye production was a little below the 1935-39 average, but was about a third larger than the small 1947 crop.

Europe's total breadgrain production has not changed significantly from the earlier estimate. The wheat total, still placed at 1,465 million bushels, is near average and about 44 percent above the small 1947 outturn. Recovery from last year's disastrously low yields was most striking in France, where the total crop was about double that of a year ago. The increase was substantial in most other countries, however, especially in Central Europe and the Balkan countries. European rye production is estimated at 665 million bushels, only slightly above the earlier estimate, but a sharp increase over the poor 1947 harvest

(Continued on Page 207; tables follow)

WHEAT: Acreage, yield per acre, and production in specified countries, year of harvest,
average 1935-39, annual 1946-48 a/

Continent and country	Acreage b/			Yield per acre c/			Production		
	Average 1935-39 acres	1946 acres	1947 acres	Average 1935-39 bushels	1946 bushels	1947 bushels	Average 1935-39 bushels	1946 bushels	1947 bushels
NORTH AMERICA:									
Canada.....	25,595	24,076	24,260	12.2	17.2	13.9	312,399	413,725	336,758
Mexico.....	1,244	1,236	1,483	11.5	12.2	12.6	14,244	15,616	18,372
United States.....	57,297	67,075	74,389	13.2	17.2	18.4	758,629	1,153,061	1,367,186
Estimated total a/.....	84,140	92,250	99,940	-	-	-	1,086,000	1,580,000	1,720,000
EUROPE:									
Albania.....	99	135	130	15.2	16.3	15.4	1,507	2,200	2,000
Austria.....	630	545	495	25.3	18.9	19.6	15,942	10,300	9,700
Belgium.....	402	376	220	40.2	43.1	29.5	16,150	16,200	6,500
Bulgaria.....	3,762	3,768	3,680	20.5	18.0	-	69,080	67,900	-
Czechoslovakia.....	2,175	2,250	2,140	26.2	23.6	-	57,000	53,000	-
Denmark.....	319	221	60	17.1	49.4	33.3	14,470	10,915	2,000
Eire.....	225	643	580	34.2	26.9	29.3	7,689	17,271	17,000
Finland.....	230	390	398	41.2	26.5	19.1	6,100	8,000	9,781
France.....	12,560	10,106	9,250	22.8	24.7	16.2	286,510	250,000	150,000
Germany.....	4,250	-	-	34.6	-	-	147,000	-	-
Greece.....	2,150	1,875	2,086	14.0	14.1	10.2	30,205	26,500	28,292
Hungary.....	4,091	2,698	3,100	22.3	17.8	14.8	91,210	48,000	46,000
Italy.....	12,577	11,700	11,500	11,860	22.1	17.8	278,366	238,000	250,000
Luxembourg.....	47	41	20	40	23.4	22.5	1,215	959	450
Netherlands.....	333	302	212	45.7	43.6	35.4	15,217	13,180	7,500
Norway.....	80	95	86	29.9	29.1	23.5	2,391	2,761	2,800
Poland.....	3,260	-	-	22.7	-	-	74,000	-	-
Portugal.....	1,227	1,616	1,636	13.1	11.6	7.9	16,092	18,666	12,000
Romania.....	6,900	-	-	16.2	-	-	112,000	-	-
Spain.....	11,253	9,625	9,640	14.0	14.1	10.4	157,986	133,000	110,000
Sweden.....	740	743	723	35.6	33.4	21.3	26,351	25,017	14,660
Switzerland.....	183	232	225	220	32.2	30.5	6,050	7,477	8,860
United Kingdom.....	1,843	2,062	2,165	2,279	35.6	28.8	62,361	73,442	62,250
Yugoslavia.....	5,400	-	-	18.1	-	-	97,700	-	-
Estimated total a/.....	71,350	66,400	64,650	-	-	-	1,593,000	1,310,000	1,465,000
U.S.S.R. (Europe and Asia).....	104,000	69,000	73,000	11.9	10.1	11.6	1,240,000	700,000	850,000

ASIA:														
Iran.....	4,191	-	2,000	-	17.2	-	7.3	-	6.2	-	72,128	76,536	70,737	74,000
Iraq.....	1,724	-	173	-	10.7	16.1	11.7	-	11.6	-	18,114	14,697	12,500	12,000
Lebanon.....	533	340	-	-	6.1	8.4	-	-	-	-	5,244	2,570	2,021	2,000
Palestine.....	1,927	2,084	2,132	14.3	10.8	7.1	-	-	-	-	3,244	2,873	-	-
Syria.....	8,973	9,246	9,884	15.1	18.9	13.5	-	-	-	-	135,690	175,000	130,000	145,000
Turkey.....	49,000	56,800	52,818	15.3	15.6	16.2	-	-	-	-	750,000	887,800	919,600	925,000
China.....	2,896	-	-	12.6	12.6	-	-	-	-	-	36,035	-	-	-
Manchuria.....	34,977	34,977	32,000	10.7	9.6	8.6	-	-	-	-	370,660	337,449	296,427	340,000
India ^{1/}	1,735	1,562	-	28.8	14.5	19.1	-	-	-	-	49,954	22,613	28,550	-
Japan.....	832	-	-	12.3	-	-	-	-	-	-	10,240	-	-	-
Korea.....	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Estimated total ^{2/}	107,910	114,710	115,630	109,500	-	-	-	-	-	-	1,490,000	1,584,000	1,526,000	1,622,000
AFRICA:														
Algeria.....	4,184	3,200	3,700	-	8.4	11.2	7.6	-	12.1	-	35,201	36,000	28,000	45,000
Egypt.....	1,464	2,416	1,692	31.3	26.0	23.9	-	-	26.4	-	15,848	42,727	40,500	41,500
Tunisia.....	2,594	2,417	3,000	7.1	11.4	8.2	-	-	8.9	-	23,128	27,462	24,500	23,000
French Morocco.....	1,915	1,670	2,044	7.8	7.5	-	-	-	5.4	-	14,962	12,500	11,000	11,000
Union of South Africa ^{1/}	1,928	2,300	2,671	8.3	6.7	6.3	-	-	6.1	-	16,025	15,322	16,771	17,543
Estimated total ^{2/}	13,830	12,470	14,050	14,200	-	-	-	-	-	-	143,000	143,000	130,000	148,000
SOUTH AMERICA:														
Argentina.....	15,834	13,824	11,656	-	14.0	14.9	21.0	-	14.2	-	221,769	206,314	245,000	170,000
Brazil.....	414	704	831	10.5	10.5	12.2	13.0	-	-	-	4,978	9,114	10,846	11,800
Chile.....	1,965	1,873	2,023	21.3	16.1	17.7	19.5	-	18.8	-	31,562	33,165	39,360	40,268
Peru.....	285	247	247	11.5	11.5	14.9	14.1	-	-	-	3,274	3,674	3,491	-
Uruguay.....	1,210	659	1,248	1.253	11.0	10.1	12.5	-	13.5	-	13,255	6,681	15,562	16,942
Estimated total ^{2/}	20,470	18,130	16,510	17,010	-	-	-	-	-	-	281,000	264,000	319,000	249,000
OCEANIA:														
Australia.....	13,128	13,180	13,850	13,000	12.9	8.9	15.9	-	15.4	-	159,744	117,262	220,000	200,000
New Zealand.....	221	141	129	150	32.3	38.1	36.3	-	36.7	-	7,129	5,368	4,539	5,500
Total.....	13,349	13,321	14,000	13,150	-	-	-	-	-	-	176,873	122,630	224,539	205,500
Estimated world total ^{2/}	418,080	386,280	397,850	415,500	-	-	-	-	-	-	6,010,000	5,704,000	5,790,000	6,415,000

a/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow: thus, the crop harvested in the Northern Hemisphere in 1943 is combined with preliminary forecasts for the Southern Hemisphere harvests which began late in 1943 and ended early in 1949. b/ Figures refer to harvested areas as far as possible. c/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. d/ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, revised preliminary forecasts. e/ Estimated totals, which in the case of production are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown. f/ Figure for 1935 only. g/ Average of less than 5 years. h/ Estimates for Syria and Lebanon not shown separately during this period. i/ Includes Pakistan. j/ European production only. k/ non-reporting area not shown are included in estimated total for Asia.

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RYE: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1946-48 $\frac{a}{b}$

Continent and country	Acreage $\frac{b}{c}$			Yield per acre $\frac{c}{d}$			Production		
	Average 1946	1947	Average 1946	1947	Average 1946	1947	1946	1947	
	1945-39	1946	1947	1945-39	1946	1947	1945-39	1946	
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
	acres	acres	acres	acres	acres	acres	bushels	bushels	
	816	715	2,103	11.3	12.3	11.4	9,191	8,811	
Canada.....	1,699	1,607	2,097	12.1	11.7	12.9	14,917	15,375	
United States.....	4,515	2,322	3,166	4,200	1,360	17.8	54,108	39,132	
Total.....	881	620	596	23.4	19.0	19.1	20,611	11,400	
EUROPE:	Belgium.....	2301	368	37.8	36.6	40.3	10,500	8,700	
Bulgaria.....	746	500	746	17.6	17.0	37.8	14,319	9,500	
Czechoslovakia.....	2,350	2,160	1,797	26.0	25.5	—	11,150	8,500	
Denmark.....	344	259	344	28.2	32.9	—	61,000	55,000	
Finland.....	500	366	387	24.6	19.7	20.3	9,973	11,238	
France.....	1,634	1,150	1,360	18.6	17.0	22.1	12,300	7,600	
Germany.....	7,035	—	—	29.1	—	17.8	30,013	19,500	
Greece.....	163	133	125	13.8	14.8	10.8	205,000	—	
Hungary.....	1,585	1,122	1,256	18.5	14.9	14.4	2,244	1,970	
Italy.....	2,952	2,591	2,601	21.7	17.6	13.9	29,394	16,701	
Luxembourg.....	18	13	15	25.7	25.7	19.2	5,456	4,500	
Netherlands.....	560	448	494	36.4	32.3	26.7	462	366	
Norway.....	13	6	5	31.2	32.8	27.9	20,394	17,946	
Poland.....	13,425	—	—	21.2	25.0	35.0	405	197	
Portugal.....	342	598	605	13.1	10.2	—	284,000	—	
Romania.....	640	—	—	15.6	—	9.1	4,485	6,100	
Spain.....	1,466	1,460	1,460	13.6	13.7	12.3	19,205	20,078	
Sweden.....	495	387	395	30.0	24.4	31.4	14,828	11,384	
Switzerland.....	38	31	38	33.2	30.6	30.9	1,260	1,134	
United Kingdom.....	16	55	61	24.9	28.4	29.5	398	1,960	
Yugoslavia.....	633	—	—	13.4	—	—	8,500	—	
Estimated total $\frac{a}{b}$	33,340	26,370	27,350	29,470	—	—	766,000	510,000	
U.S.S.R. (Europe and Asia).....	60,800	70,000	73,000	14.6	11.4	13.0	885,000	800,000	
ASIA:	—	—	—	—	—	—	—	—	
Turkey.....	979	988	1,046	15.2	18.4	14.3	14,301	18,200	
SOUTH AMERICA:	—	—	—	—	—	—	—	—	
Argentina.....	1,078	2,084	1,731	9.1	10.4	11.9	9,771	21,731	
AFRICA:	—	—	—	—	—	—	—	—	
Union of South Africa.....	117	191	—	6.8	7.1	8.4	794	1,604	
Estimated world total $\frac{a}{b}$	100,910	102,100	106,530	109,070	—	—	1,731,000	1,520,000	

$\frac{a}{b}$ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow. Thus, the crop harvested in the Northern Hemisphere in 1946 is combined with preliminary forecasts for the Southern Hemisphere harvests, which began late in 1946 and ended early in 1949. $\frac{b}{c}$ Figures refer to harvested areas as far as possible. $\frac{c}{d}$ Yield per acre are calculated from acreage and production data shown, except for incomplete periods. $\frac{d}{e}$ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, revised preliminary forecasts. $\frac{e}{f}$ Average of less than 5 years. $\frac{f}{g}$ Figure for 1935 only. $\frac{g}{h}$ Estimated totals, which in the case of production are rounded to millions. Include allowances for any missing data for countries shown and for other producing countries not shown.

$\frac{a}{b}$ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere in 1946 is combined with preliminary forecasts for the Southern Hemisphere harvests, which began late in 1945 and ended early in 1946. $\frac{b}{c}$ Figures refer to harvested areas as far as possible. $\frac{c}{d}$ Yield per acre are calculated from acreage and production data shown, except for incomplete periods. $\frac{d}{e}$ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, revised preliminary forecasts. $\frac{e}{f}$ Average of less than 5 years. $\frac{f}{g}$ Figure for 1935 only. $\frac{g}{h}$ Estimated totals, which in the case of production are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown.

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WORLD PRODUCTION OF BROAD AND HORSE BEANS BELOW PREWAR 1/

Production of broad and horse beans in 26 of the more important producing countries of the world is estimated at about 90 million bags in the 1948-49 season. While this is slightly above the estimated production in these countries for the past 2 seasons, it is still 10 percent below the 100 million bags estimated for the prewar period.

This 10 percent decline is largely due to the very low production in the European countries where the 1948 crop is estimated at only 55 percent of the prewar level. Nearly every European country reports a marked decline in broad and horse bean production since prewar. Production in Turkey, Iraq and Japan is also down by 50 percent or more. On the other hand a small percentage increase is reported for China which in total volume almost offsets the decline in other countries. China is by far the world's largest producing country. Of the 90 million bags reported in 1948, almost 70 million or 75 percent were produced in China alone.

Much of the decline in Europe is attributable to a decline in acreage, but yields also have been reduced by about one-third. The average yield in 1948-49 in Europe is estimated at 613 pounds per acre as compared to 938 pounds in prewar. It is significant that production of this type of pulse has declined more in, or near, Europe than in any other general area. Production of every important type of pulse grown in Europe is below prewar, as has been reported in previous issues of Foreign Crops and Markets. See footnote 1/.

The 1948 production of haricot beans is down 12 percent from prewar; dry peas is down 3 percent; garbanzos down 15 percent and lentils down 8 percent.

Broad and horse beans are common to the countries of southern Europe and Asia and to northern Africa. Smaller quantities are reported from Latin America, where Mexico and Ecuador are the largest producers. Very small quantities are also grown in the United States especially near New York City, and in California, where they are largely consumed locally.

These beans are large, dark brown or purple black in color, irregular in shape and are used both in the green and dry form. In Europe they are a winter grown crop, being among the earliest green vegetables to become available in the spring. The beans are picked green and eaten sometimes with the pods and often without cooking. The proportion consumed green, however, appears to be small compared to the quantity consumed dry. The figures herein pertain for the most part to the dry production.

1/ For lentils see Foreign Crops and Markets February 14, 1949
 For haricot beans see Foreign Crops and Markets December 20, 1948
 For dry edible peas see Foreign Crops and Markets January 1, 1949
 For garbanzo beans see Foreign Crops and Markets February 7, 1949

BROAD AND HORSE BEANS: Acreage, yield and production in 26 countries, 1935-39 average and annual 1946 to 1948 1/

Continent and country	Acreage				Yield per acre 2/				Production (bags of 100 pounds)			
	Average, 1935-39	1946	1947	1948 1/	Average, 1935-39	1946	1947	1948 1/	Average, 1935-39	1946	1947	1948 1/
	acres	acres	acres	acres	Pounds	Pounds	Pounds	Pounds	bags	bags	bags	bags
AMERICA:												
Mexico.....	70:	94:	90:	96:	444:	438:	578:	625:	311:	412:	520:	500
Guatemala.....	4:	4:	4:	4:	650:	625:	625:	625:	26:	26:	23:	25
Bolivia.....	10:	11:	10:	11:	1,280:	1,364:	1,300:	1,364:	128:	150:	130:	150
Chile.....	3:	3:	3:	3:	970:	900:	800:	800:	25:	27:	20:	20
Ecuador.....	25:	26:	27:	27:	244:	259:	259:	259:	61:	70:	65:	70
Total.....	112:	138:	134:	141:	492:	492:	571:	618:	551:	675:	765:	865
EUROPE:												
Belgium.....	23:	10:	19:	13:	2,230:	2,070:	1,258:	815:	513:	207:	239:	106
Bulgaria.....	2:	1:	1:	1:	924:	523:	673:	846:	17:	5:	9:	11
Czechoslovakia.....	20:	15:	7:	4:	500:	500:	898:	1,407:	100:	75:	67:	53
France.....	147:	86:	94:	84:	1,166:	898:	818:	952:	1,714:	772:	769:	800
Greece.....	54:	35:	69:	61:	772:	571:	509:	544:	417:	200:	351:	425
Italy.....	1,613:	1,063:	1,171:	1,293:	888:	885:	585:	585:	13,998:	6,424:	6,424:	7,320
Portugal.....	137:	205:	220:	200:	603:	771:	682:	800:	826 5/8:	1,581:	1,500:	1,600
Romania.....	5:	3:	1:	1:	743:	158:	446:	195:	39:	4:	5 5/8:	1
Spain.....	357:	345:	350:	330:	1,250:	851:	522:	576:	4,467:	2,937:	1,828:	1,900
Total.....	2,358:	1,763:	1,932:	1,993:	938:	680:	579:	613:	22,121:	11,997:	11,192:	12,215
ASIA:												
Iraq.....	20:	2:	7:	9:	960:	600:	600:	667:	192:	12:	42:	60
Lebanon.....	4:	4:	4:	6:	456:	1,996:	1,750:	2,000:	17:	74:	70:	120
Palestine.....	8:	4:	3:	5:	363:	225:	267:	300:	29:	9:	8:	15
Syria.....	100:	45:	45:	70:	900:	667:	1,400:	1,260:	900:	700:	630:	882
Turkey.....	169:	73:	73:	114:	933:	652:	607:	690:	1,576:	443:	478:	787
China.....	6,931:	7,048:	7,124:	7,002:	960:	919:	952:	960:	66,535:	64,776:	67,851:	67,224
Japan.....	80:	46:	42:	42:	1,280:	1,132:	1,032:	814:	1,024:	406:	431:	742
Total.....	7,312:	7,212:	7,298:	7,248:	961:	916:	952:	958:	70,273:	66,075:	69,478:	69,430
AFRICA:												
Algeria.....	76:	60:	53:	46:	500:	333:	268:	441:	380:	200:	142:	203
French Morocco.....	150:	65:	86:	84:	365:	482:	395:	423:	548:	313:	340:	355
Spanish Morocco.....	10:	19:	25:	24:	603:	108:	880:	958:	64:	205:	220:	230
Tunisia.....	71:	60:	50:	45:	758:	252:	220:	444:	538:	151:	110:	200
Egypt.....	400:	395:	396:	413:	1,598:	1,674:	1,455:	1,533:	6,821:	6,614:	5,761:	6,330
Total.....	707:	599:	610:	612:	1,139:	1,249:	1,078:	1,196:	8,051:	7,483:	6,573:	7,318
Total 26 countries.....	10,489:	9,712:	9,974:	9,994:	963:	888:	882:	899:	100,936:	86,212:	88,008:	89,828

1/ Years shown indicate year of harvest in the Northern Hemisphere and of beginning harvest in the Southern Hemisphere. 2/ The yields per acre for countries having a small production were calculated on the basis of unrounded estimates of acreage. 3/ Less than 5-year average in some instances.

4/ Preliminary. 5/ Reported from Portugal as 530 million liters which seems to be in error. Assumed for the purposes of this report to be 93 million liters. 6/ 1,323 bags.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics, reports of United States Foreign Service officers, results of office research, and other information.

FOREIGN 1948 DRIED FIG ESTIMATE DECLINES 1/

The preliminary estimate of dried fig production during 1948 in the leading commercial producing countries, excluding the United States, is estimated at 178,800 short tons compared with 191,400 tons in 1947 and 155,600 tons in 1946. The estimate represents a 26 percent increase over the 5-year (1942-46) average of 141,500 tons and a 10 percent increase over the 10-year (1937-46) average of 163,000 tons.

The 1948 production in Algeria was somewhat larger than anticipated earlier in the season. Declines from early season estimates were reported for Italy, Portugal and Turkey. The lower production estimates in these countries are due to adverse weather during the growing and harvesting seasons which considerably impaired both the quality of the figs and size of the harvest. Dried fig production in the United States, which early in the season was estimated by trade groups at about 22,000 tons, is now officially estimated at 29,500 tons. The pack, while the smallest since 1931, is only 13 percent below the 5-year (1942-46) average of 33,900 tons and 8 percent below the 10-year (1937-46) average of 32,100 tons.

Dried fig production is not confined to the countries shown in table 1. Spain, Syria, and Lebanon produce and export dried figs but data on the industry in these countries are incomplete and the production estimates therefore are not included in the table. Practically all other Mediterranean Basin countries produce some figs but production in most of these is small and almost exclusively for the domestic market. Elsewhere in the world, small plantings are found in many Latin American countries, the Near East, Far East and Australia.

During the 1948-49 season to date Turkey has been the principal exporting country for dried figs. The Turkish 1948 pack was almost entirely sold before the end of 1948 and at present it may be considered that the season for practical purposes is closed. The United Kingdom was the destination for most of the Turkish exports while the United States was a very minor outlet, taking only about 173 tons.

This export season for the other 3 principal exporting countries, Greece, Italy and Portugal has been rather disappointing. The official export statistics covering this commodity in these countries are not yet available, but on the basis of trade estimates, the exports have been very small. The slow export movement in these countries is the result of a combination of factors. The very competitive Turkish figs, poor quality, inflated prices in some producing countries and lack of foreign exchange in many of the principal importing countries are all given as reasons for a slow year. The continued absence of German and Austrian buyers has also been given by some exporters as a reason for the lack of export volume. Austria before World War II was one of the most important buyers of inedible figs. It appears on the basis of

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

TABLE I. DRIED FIGS: Estimated commercial production in specified countries, 1948 with comparisons (Rounded to nearest 100 short tons)

Year	Algeria	Argentina	Greece	Italy	Portugal
	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Average</u>					
1942-46	14,900	600	18,400	68,300	9,200
1937-46	16,700	600	22,100	81,600	8,600
<u>Annual</u>					
1940	20,800	300	31,900	107,400	7,700
1941	19,000	1,400	23,100	80,200	11,000
1942	14,900	800	20,900	85,400	8,800
1943	17,200	400	16,500	66,000	12,100
1944	9,500	200	13,200	70,400	8,800
1945	10,400	300	19,800	59,200	5,500
1946	22,700	1,300	21,400	60,500	11,000
1947 <u>b/</u>	48,600	1,000	27,800	66,000	10,400
1948 <u>b/</u>	<u>a/</u> 38,500	1,100	28,600	<u>a/</u> 67,500	<u>a/</u> 9,900
	South Africa	Turkey	Total foreign countries	United States	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Average</u>					
1942-46	200	29,900	141,500	33,900	175,400
1937-46	<u>a/</u> 200	33,300	<u>a/</u> 163,100	32,100	<u>a/</u> 195,200
<u>Annual</u>					
1940	100	32,000	200,200	32,000	232,200
1941	100	38,500	173,300	33,500	206,800
1942	200	19,800	150,800	28,200	179,000
1943	200	27,500	139,900	36,700	176,600
1944	200	35,200	137,500	35,200	172,700
1945	200	28,600	124,000	32,600	156,600
1946	200	38,500	155,600	36,600	192,200
1947 <u>b/</u>	200	37,400	191,400	38,000	229,400
1948 <u>b/</u>	200	<u>a/</u> 33,000	<u>a/</u> 178,800	<u>a/</u> 29,500	<u>a/</u> 208,300

a/ Revised b/ Preliminary.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U. S. Foreign Service Officers, results of office research or other information.

UNITED STATES: Imports of dried figs by specified countries,
1947-48 with comparisons

(September August Crop Year)

Year	Turkey	Greece	Italy	Other countries	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Average</u>					
1943-47	715	214	61	3	993
1938-47	560	373	110	15	1,058
<u>Annual</u>					
1940-41	316	394	0	46	756
1941-42	48	10	0	26	84
1942-43	0	0	0	31	31
1943-44	0	0	0	a/	a/
1944-45	5	0	0	a/	5
1945-46	1,750	0	a/	1	1,751
1946-47	921	574	161	7	1,663
1947-48	900	497	145	4	1,546
1948-49 b/	179	794	195	4	1,172

a/ Less than one-half ton.

b/ 4 months - September through December, 1948

Compiled from official records of the Bureau of the Census.

available information that Austria has in a small way come back into the market this season.

The unsold stock situation at mid-season is a little difficult to evaluate. It is estimated that in Algeria, Greece, Portugal and Turkey about 33,000 tons of edible figs remained on January 1. This stock figure represents 18 percent of the total production for these 4 countries. Greece, it is reported, holds 17,500 tons of this total and Turkey 1,500. The quantity still on hand in Italy is not known as most of the pack is still in growers' hands or has been sold by growers direct to consumers. Unless some unexpected foreign demand develops soon, a very large proportion of the present stocks will be carried over into the 1949-50 season in all countries except Turkey.

WORLD BREADGRAIN (Continued from Page 198).

of 490 million bushels. Most of the increase is in the important rye producing countries of central Europe.

Breadgrain production in the Soviet Union is indicated to be about 52 million short tons, or roughly 10 percent above the estimated 56.5 million ton harvest in 1947. Wheat production, placed at 1,025 million bushels would be approximately 20 percent larger than the 1947 outturn, reflecting the substantial increase in wheat acreage reported for the Soviet Union this year. Yields, however, appear to have been below last year's good levels. No increase is estimated for rye acreage, and with slightly smaller yields than in 1947, the total outturn is estimated to be slightly less than a year ago, but about 5 percent above average.

The wheat crop in Asia is now estimated at 1,622 million bushels, a slight reduction from the previous estimate. The reduction was principally the result of lower estimates for China, India and Turkey. Yields in China were somewhat larger than average, and the outturn from the above-average acreage is now placed at 925 million bushels, compared with 750 million during 1935-39. Yields were also larger than the good 1947 yields. Wheat production in the Indian Union and Pakistan, together, is estimated at about 340 million bushels. Though 15 percent above the poor 1947 harvest, this is still somewhat below average. Turkey's wheat crop, placed at 145 million bushels, is larger than average as well as above the small 1947 outturn. Rye is not reported for this area, except in Turkey, where the production of 15.5 million bushels is slightly above average.

Africa's wheat crop is estimated at 148 million bushels, slightly above average. The increase occurred principally in Algeria. Production there was above average and substantially above the small yield in 1947. In Egypt and French Morocco, the other ranking producers, no significant changes are reported. Rye is not important in Africa. The crop in the Union of South Africa, the largest producer, amounts to only slightly over a million bushels, according to preliminary indications.

Wheat production in South America is tentatively placed at about 250 million bushels, compared with the 1935-39 average of 280 million bushels and last year's good outturn of about 320 million. Less favorable growing conditions in Argentina account for the smaller crop than a year earlier, since production in all other countries of the area is estimated to be above average. The Argentine crop is tentatively placed at 170 million bushels, or only about 75 percent of the 1935-39 level. The decline is attributed to reduced acreage, with yields about average. In Chile, the second country of importance in wheat, the outturn is reported at 40 million bushels, compared with the average of 32 million. Both acreage and yields are reported above average. Rye production is estimated at 10 million bushels for the continent or about average, though only about half the 1946 and 1947 crops.

Wheat in Australia is now estimated at about 200 million bushels, one of the largest crops in the country's history, following the record production of 220 million bushels in 1947. The current crop is about 18 percent above average with acreage about at the 1935-39 level.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of C. M. Purves, Acting Chairman, Robert L. Gastineau, Judith E. Downey, Constance H. Farnworth, Mary E. Long, and Karen Friedmann.

WORLD PRODUCTION OF BROAD AND HORSE BEANS--- (Continued from Page 202).

The terms broad and horse beans seem to be used loosely. Some countries report production of each kind separately, while other countries in the same general area report both kinds in one figure or report only one kind to the exclusion of the other even when both kinds apparently are produced. Generally, however, the term broad bean is applied to a large flat bean. The term horse bean is applied to a bean of smaller circumference but thicker. Broad beans are considered the more palatable of the 2 varieties for man. The horse bean is used in some countries almost exclusively for feed, but a large share of the broad beans also are used for livestock feed. Italy has reported that as much as two-thirds of the broad bean crop normally is used for livestock feed. A considerable part of this may be the smaller or horse bean type. The proportion used for feed varies from year to year with the relative scarcity and prices of beans and competing products.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

INDOCHINA'S RICE EXPORTS SHOW MODERATE GAIN

Rice exports, excluding derivatives, from French Indochina during 1948 amounted to 432 million pounds compared with 149 million pounds in the preceding year, according to the American Consulate General at Saigon. French Indochina before World War II ranked second in world rice exports, shipping more than 3,000 million pounds annually. Deliveries in 1948 increased to 13 percent of prewar average exports compared with 5 percent of prewar in 1947. The principal countries of destination were the French colonies in Africa, France, Malayan Union and Hong Kong.

FRENCH INDOCHINA: Rice exports, 1948,
with comparisons

Classification:	Average 1936-40	1948					Total
		January-	April-	July-	October-		
		March	June	September	December		
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	
Paddy.....	346	a/	0	0	0	a/	
Cargo.....	171	2	8	1	1		12
Whole.....	1,272	87	47	124	71		329
Broken.....	1,345	17	32	35	7		91
Flour.....	219	-	-	-	-	-	-
Total b/:	3,250	106	87	160	79		432

a/ Less than 500,000 pounds. b/ In terms of milled, excluding in 1948 derivatives (nonedible) which may include some flour. Paddy is converted to terms of milled at 70 percent.

Compiled from trade publications.

Present rice exports from French Indochina are being held up by lack of supplies at ports. Current stocks are at a low level, and revolutionaries have continued to intercept the transportation of rough rice to ports, where it normally is milled for consumption and export. Should these conditions improve, Indochina during 1949 may be able to export the 660 million pounds committed under International Emergency Food Committee arrangements.

The controlled export price for long clear rice, 15 percent broken f.o.b. Saigon is \$8.93 per 100 pounds, and for round No. 1, 25 percent broken, \$8.04 per 100 pounds.

ECUADOR INCREASES RICE ACREAGE

The 1949 acreage of Ecuador's main rice crop is reported at 10 percent larger than in the preceding year, according to the American Consulate General at Guayaquil. Weather so far has been beneficial for the crop which was recently planted, and total 1949 production is forecast at 8,000,000 bushels of rough rice (230 million pounds milled). This compares with 6,945,000 bushels (200 million pounds) the year before, and with 3,400,000 bushels (100 million pounds) in the prewar (1936-40) period.

Record exports in 1948 amounted to nearly 150 million pounds, according to unofficial data. Postwar rice exports from Ecuador up to 1948 approximated 130 million pounds, or more than 4 times the average (1937-41) prewar exports of 31 million pounds.

CANADA INCREASES INITIAL WHEAT PRICE

The initial price to Canada's western wheat producers has been increased 20 cents per bushel, bringing the initial payment to \$1.75 per bushel, basis No. 1 Northern in store Fort William/Port Arthur or Vancouver. The increased rate to become effective April 1, is retroactive, applying to all deliveries to the Wheat Board back to August 1, 1945 and is to apply on all deliveries to July 31, 1950.

Deliveries to the Board between the two above dates constitute a 5-year pool. When the pool was first established the initial payment was set at \$1.35 per bushel. This rate was increased to \$1.55 per bushel, effective April 1, 1948. That increase also applied to all marketings since the establishment of the pool. After the conclusion of the pool on July 31, 1950, growers are to share in any accrued profits.

Checks covering payment for past deliveries, at the lower rate then in effect, are to be sent out beginning March 31. The Government plans to distribute the checks early when growers are incurring expense for seeding and early-summer operations.

TOBACCO

BRAZIL'S TOBACCO PRODUCTION INCREASING

Brazil's 1948-49 tobacco crop is estimated by trade sources at about 255 million pounds, or 22 percent above 1947-48, while the area planted to tobacco is estimated at about 302 thousand acres or a reduction of 5 percent from 1947-48. If this production forecast materializes, it will be one of the largest tobacco crops ever produced in Brazil, and 31 percent above the crop in the prewar year, 1938-39.

The production of flue-cured tobacco has increased much more rapidly than has other types. Production of this type, which is confined almost entirely to the States of Rio Grande do Sul and Santa Catarina, is estimated at 47.4 million pounds for 1948-49, as compared with 41 million pounds in 1947-48 and 11.7 million pounds in 1938-39, or an increase of 305 percent since prewar. The production of all other types is estimated for 1948-49 at 204.7 million pounds, as compared with 157.1 million pounds in 1947-48 and 163.2 million pounds in 1938-39; or an increase of only 21 percent since prewar.

BRAZIL: Area and production of tobacco
by types 1948-49 with comparisons

Year	Flue-cured		So. Air-cured		Cigar & Other		Total	
	Area	Production	Area	Production	Area	Production	Area	Production
	: 1,000:	: Mil.	: 1,000:	: Mil.	: 1,000:	: Mil.	: 1,000:	: Mil.
	: acres:	: pounds	: acres:	: pounds	: acres:	: pounds	: acres:	: pounds
1938-39 a/	9.5	11.7	36.0	36.6	184.5	126.6	230.0	174.9
1946-47 a/	27.7	32.7	39.5	76.0	304.1	115.7	371.3	224.4
1947-48 b/	34.3	41.0	36.0	35.5	249.7	121.6	320.0	198.1
1948-49 b/	38.1	47.4	49.1	80.3	215.2	127.1	302.4	254.3

a/ Compiled from official sources.

b/ Preliminary, based on trade estimates.

BURMA'S TOBACCO ACREAGE ABOVE PREWAR
LEVELS; EXPORTS AND IMPORTS LOW

Burma's tobacco acreage is now above prewar levels, according to the American Embassy in Rangoon. Prior to the war the area planted to tobacco averaged about 108 thousand acres annually, but during the war it declined to about 75 thousand acres annually. A ready demand and favorable prices for tobacco have resulted in an increase to about 132 thousand acres for 1948-49.

Practically all of the tobacco grown in Burma is of the *nicotiana tabacum* species, but a small amount of *nicotiana rusticum* is also grown. Most of the tobacco grown in Burma bears little resemblance to American types, but experiments in the growing of Virginia-type cigarette tobaccos was undertaken by the government several years ago and has been continued. Commercial production has not developed because of the lack of demand in the country.

There is only one cigarette factory and no large cigar factory in Burma. Most of the manufacture of tobacco products is carried on in homes and small shops, and cheroots are the principal product manufactured in these small establishments. The government has plans to build a cigarette factory with a daily production of 2.5 million cigarettes, but the Embassy reports that the factory will probably not be constructed for several years.

Exports and imports of leaf and manufactured tobacco products are still far below prewar levels. In 1947-48 Burma exported 36,000 pounds of leaf tobacco, compared with an average of 3,161,000 pounds annually in the period 1937-41. In 1947-48 imports of leaf and manufactured tobacco totaled 953,000 pounds, compared with an average 17,682,000 pounds in the period 1937-41. Tobacco imports are not discouraged by the government in view of the substantial customs duties received.

COTTON AND OTHER FIBERCOTTON-PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the
U.S. gulf-port average

Market location, kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalen U.S. cent per pound
<u>Alexandria</u>		: Kantar	:	:	:
Ashmouni, Good.....	3-10	: 99.05 lbs.	: Tallari	: 51.15	: 42.68
Ashmouni, F.G.F.....	"	: "	: "	: 49.40	: 41.22
Karnak, Good.....	"	: "	: "	: 83.00	: 69.25
Karnak, F.G.F.....	"	: "	: "	: (not quoted)	:
<u>Bombay</u>		: Candy	:	:	:
Jarila, Fine.....	"	: 784 lbs.	: Rupee	: 620.00	: 23.86
Broach, Fine.....	"	: "	: "	: 650.00	: 25.01
Kampala, East African.....	"	: "	: "	: (not available)	:
<u>Karachi</u>		: Maund	:	:	:
4F Punjab, S.G., Fine.....	3-9	: 82.28 lbs.	: "	: 87.00	: 31.90
289F Sind, S.G., Fine.....	"	: "	: "	: 95.00	: 34.83
289F Punjab, S.G., Fine....	"	: "	: "	: 98.00	: 35.93
<u>Buenos Aires</u>		: Metric ton	:	:	:
Type B.....	3-10	: 2264.6 lbs.	: Peso	: a/3350.00	: 45.24
<u>Lima</u>		: Sp. quintal	:	:	:
Tanguis, Type 5.....	:	: 101.4 lbs.	: Sol	:	:
Pima, Type 1.....	:	: "	: "	:	:
<u>Recife</u>		: Arroba	:	:	:
Mata, Type 4.....	3-10	: 33.07 lbs.	: Cruzeiro	: 215.00	: 35.37
Sertao, Type 5.....	"	: "	: "	: 215.00	: 35.37
<u>Sao Paulo</u>		:	:	:	:
Sao Paulo, Type 5.....	"	: "	: "	: 209.00	: 34.39
<u>Torreón</u>		: Sp. quintal	:	:	:
Middling, 15/16".....	"	: 101.4 lbs.	: Peso	: 192.00	: 27.16
<u>Houston-Galveston-New</u>		:	:	:	:
Orleans av. Mid. 15/16"....	"	: Pound	: Cent	: XXXXX	: 32.48

Quotations of foreign markets reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

a/ Nominal.

BRITISH EAST AFRICAN SISAL PRODUCTION IN 1948 EXCEEDS WARTIME AVERAGE

Production of sisal in British East Africa in 1948 is reported at 357.4 million pounds, compared with 299.8 million each in 1947 and 1946 and an average of 291.6 million pounds in the 5-year period 1941-45. The only other British East African sisal crops exceeding 300 million pounds were 322.3 million pounds in 1945, 319.0 million in 1944, and 301.1 million in 1939. The smallest crops in the past 15 years were 233.2 million pounds in 1941 and 261.2 million in 1934.

Tanganyika accounted for 276.7 million pounds in 1948, compared with 236.4 million in 1947 and an average of 226.9 million during 1941-45. Production in Tanganyika increased from about 73 percent of British East African sisal in the prewar years to nearly 78 percent during World War II and nearly 79 percent during the past 3 years.

Production in Kenya and Uganda decreased from a prewar average of 69.4 million pounds to a 1941-45 average of 64.7 million. The 1946 crop was only 60.6 million pounds. After a small increase in 1947, however, production increased to 80.7 million pounds in 1948. The past year's crop has been exceeded only by the 85.1 million pounds produced in 1939.

Improved labor supply has been the principal factor contributing to the large output in 1948. Continued improvement in the number of laborers and the maturity of wartime plantings may result in a 1949 production of around 400 million pounds in 1949 if other conditions remain satisfactory.

Exports of sisal from British East Africa during 1948 totaled 332.8 million pounds, or roughly 26 percent more than the 263.3 million exported in 1947. Of the 332.8 million pounds, 311.8 million pounds were long fiber and the remaining 21.0 million were tow and other classes of sisal. The United Kingdom was the principal purchaser, receiving 235.6 million pounds. About 41.5 million pounds were shipped to Canada, 26.2 to the United States, 17.9 to Australia, and 4.5 to Japan. The remaining 7.1 million were shipped to South Africa, Palestine, and Egypt.

Wholesale prices of sisal remained unchanged through the latter half of 1948. The contract between the British Board of Trade and the sisal growers providing for British bulk purchase of all British East African sisal expired at the end of the year. Present open-market sales are reported to be based on a price of about 16-7/8 cents per pound, c.i.f. United Kingdom for grade No. 1 (including Prime No. 1).

The newly formed Kenya Sisal Association and TASMA (the Tanganyika Sisal Marketing Association) are reported to be working together closely and functioning satisfactorily. More time will be required, however, before the effectiveness of the marketing schemes can be evaluated.

The quality of the 1948 crop was good. More than 27 percent of the Tanganyika crop was classed as No. 1. About 49 percent of it was in grades A, 2, and 3L; 11 percent was in grade 3; and the remaining 13 percent was composed of rejects, tow, and other low grades. The Kenya-Uganda crop graded somewhat lower with only about 11.5 percent of it in No. 1 and 31 percent in classes A, 2, and 3L. More than 28 percent was in No. 3 and 29.4 percent in the lower grades.

SUPPLIES OF RAW COTTON INCREASE IN FRANCE

Imports of raw cotton into France increased in November and December and French stocks have again been raised to a satisfactory level, according to Jack L. Philippot of the American Embassy in Paris. Raw cotton stocks were reported at 384,000 bales on January 1, 1949, an increase of 100,000 bales over the low point of November 1, 1948. Stocks on January 1 represent about a four and a half months' supply which the French consider satisfactory.

The French textile industry produces a variety of goods and must keep a wide range of various qualities of cotton on hand to fill specialized requirements. The cotton textile industry is also widely dispersed in eastern and northeastern France and transportation is slow and difficult over most of the country.

The increase in stocks was confined entirely to American cotton. Stocks of other growths continued to decline. France's supply of Egyptian cotton is very short.

Although 110,000 bales of cotton arrived in France in November and 99,000 bales in December, as compared to an average monthly consumption of 85,000 bales, stocks at the mills remained very short through December. Due to the slow internal distribution system, resulting from inadequate trucking facilities and other difficulties, these increased supplies had not reached the mills by January 1, 1949. By this date mill stocks had declined to about one month's supply, or the lowest point in the postwar period.

Although cotton consumption started off the season (beginning August 1, 1948) well above the previous season, shortages of raw cotton and power cuts caused consumption to decline in the latter part of 1948. Cotton consumption fell from 100,000 bales in September 1948 to a monthly average of 85,000 bales in November and December. In view of the tight cotton situation in the latter part of 1948 and reduced mill operations it is doubtful that cotton consumption for the 1948-49 season will exceed the 1.1 million bales consumed in the previous year.

France's principal source of raw cotton for many years has been and still is the United States, which in prewar years supplied about 50 percent of all raw cotton imported into France. In 1947-48 and the first 3 months of the present season the United States has supplied about 30 percent of French imports. However, as foreign exchange is short and

cotton supplies in producing countries other than Egypt and the United States are short, France must depend more heavily on ECA and United States cotton under the ECA program. In November and December of 1948, 73 percent of all cotton arriving in France came from the United States. On January 1, 1949, about 64 percent of cotton stocks in France was of United States origin. As increased supplies reach the mills, consumption of United States cotton may be increased considerably.

The Economic Cooperation Administration from the beginning of its program through January 1949 had issued purchase authorizations to France for about 630,000 bales of cotton. About 35 percent of this cotton had been shipped by January 1, 1949. To maintain cotton consumption at present levels it is estimated the French must secure a total of from 700,000 to 800,000 bales from the United States.

France and Brazil have a trade agreement but it has failed to produce enough exchange to permit an increase in imports of cotton from Brazil. Brazil has exported about 70,000 bales of cotton to France in the first half of the 1948-49 season, but due to exchange difficulties in France and short supplies of cotton in Brazil, this cotton trade is not likely to be increased in the last half of the season.

High prices and difficulties in exchange have reduced imports of Egyptian cotton. In the first 5 months of the 1948-49 season France imported less than 60,000 bales of Egyptian cotton or about half its normal needs. Stocks of Egyptian cotton on January 1, 1949, amounted to only 30,000 bales or about 6 weeks' supply.

Imports of cotton from Pakistan and India have practically stopped as most of Pakistan's cotton has been allocated to other countries and India is also experiencing a cotton shortage.

France receives the entire supply available in the French African Colonies but this amounts to only 10 percent of total requirements.

Imports of raw cotton are strictly controlled by the government because of the scarcity of foreign exchange. The importation and allocation of cotton is supervised by the GIRC (Groupement d'Importation et de Ripartition du Coton) which was established by the French Government before World War II. This Association receives specified amounts of various foreign currencies and purchases and imports foreign cotton into France. The allocation to spinners is based on past consumption and needs.

Early in 1948 a few large spinners were authorized to trade directly with overseas shippers. This initial group has now been expanded to include 114 spinners and in November and December more than half the arrivals were purchases by private trade. Authorized

spinners, however, may purchase cotton directly from foreign suppliers only after receiving notification of the amount of foreign exchange that will be made available to them. A control committee supervises the activities of these individual purchasers to make sure that purchases are made within price limitations and that cotton grades correspond to the needs of the industry.

The GIRC will be needed for some time since small spinners are not equipped to handle import transactions directly. For these companies, GIRC acts as an official broker familiar with currency control procedure. This saves numerous hardships and delays.

Prices of French textiles have increased rapidly in postwar years due mostly to the increased cost of production resulting from the use of outdated machinery and the shortage of labor.

The average age of equipment in the French cotton industry is estimated at 28 years and much of the equipment is considered obsolete according to American standards. To achieve a degree of efficiency that will permit the industry to compete in world markets, much of this equipment must be modernized or replaced.

The "Monet Plan" estimates that the 8,400,000 existing spindles in France should be renovated by 1953 and that 2,000,000 modern spindles should be installed. In September 1948 only 8,243,000 of the above spindles were in operating condition and 6,526,307 were active. It was also estimated that the 200,000 looms should be partially replaced by 45,000 automatic looms. Part of this new equipment can be manufactured in France but the balance must be imported, mainly from the United Kingdom, Switzerland, and the United States. The difficult exchange position, however, will prevent fulfillment of this plan for the present.

The present labor shortage is confined mostly to the weaving industry, as the number employed in spinning mills now exceeds the 1939 level by 8 percent. The French cotton industry relies heavily upon labor from Belgium to ease the shortage of domestic manpower. It is estimated that some 60,000 Belgian workers come to northern France daily to work in the textile mills. A recent strike of these Belgian workers seriously affected textile production in this area. However, an agreement has been reached on conversion of Belgian workers' wages into Belgian francs and most of the employees were back at work by February 1.

FATS AND OILS

BURMA STRIVES FOR SELF-SUFFICIENCY IN COOKING OILS

Burma is striving to become self-sufficient in cooking oils by 1951-52 and hopes thus to eliminate the necessity of importing oils from abroad, according to the American Embassy, Rangoon. The two principal vegetable oils produced and consumed in this country continue to be, as before the war, peanut oil and sesame oil.

Peanut cultivation is carried on mostly in the sandy soil of the Magwe, Myingyan, and Pakokku Districts. The 1946-47 acreage was down to 70 percent of prewar, but subsequent crops are back to approximately 90 percent. The third official estimate places the 1948-49 area at 696,270 acres and production at 171,360 short tons compared with the 1935-39 averages of 784,000 acres and 192,000 tons. Drought conditions in July and August retarded the harvest of the past season.

Sesame is grown in the dry zone of Burma where rainfall is irregular and output subject to considerable variations. It is produced in two seasons and is divided into "early" and "late" varieties, the former being the more important. Acreage planted to sesame has recovered to nearly 90 percent of prewar. The 1948-49 early crop was affected by prolonged droughts in June, July, and August in the producing districts. According to the third estimate a total of 954,220 acres was expected to yield 47,600 tons of seed the past season compared with 1,434,000 acres and 56,000 tons, the 1935-39 averages.

The Burmese Government hopes to exceed prewar averages in 1949-50, through a program of agricultural research and education; and expansion of Government advisory services.

In prewar years an average of approximately 64,000 tons of peanut oil and 23,500 tons of sesame oil were produced annually. Postwar production figures are not available, but it may be assumed that the decline in the output of oil is in proportion to the decline in the production of the oilseeds.

Current acreage figures for minor oilseed crops in Burma are not available. In 1946-47, however, 2,646 acres were planted to rape and mustard, 7,066 to coconuts, and 1,018 to other oilseeds.

Before the war Burma imported peanut, sesame, coconut, and other oils from India and Malaya. In recent years the Government has imported smaller quantities of peanut oil from India to make up for the insufficient supply of local cooking oils. In addition, large quantities of coconut oil have been imported from Malaya and some linseed oil from India. Burma's exports of oilseeds and vegetable oils have declined to negligible quantities.

Next to rice, vegetable oils are the most important item in the Burmese diet. Before the war the per capita consumption of fats and oils was 14.5 pounds per year of which 10.3 pounds were vegetable oils. Currently consumption of vegetable oils is reduced to about 9.5 pounds per person, which is considered insufficient by government medical authorities.

Prices of peanuts and sesame have shown a sharp increase since the war. Approximate prices in Rangoon as of October 1948 were: peanuts in the shell, .824 rupees per pound (\$500 per short ton); peanut oil (local retail), .961 rupees (\$580); and sesame oil, 1.098 (\$658).

U. S. FLAXSEED AND LINSEED-OIL EXPORTS

The following table shows United States exports of flaxseed and linseed oil during 1948 with comparisons:

UNITED STATES: Flaxseed and linseed-oil exports, 1948 with comparisons

Country of destination	Flaxseed			Linseed oil		
	1946	1947 a/	1948 a/	1946	1947 a/	1948 a/
	1,000	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	pounds	pounds	pounds
Canada.....	b/	3	14	185	448	110
West Indies.....	b/	b/	b/	25	64	124
Latin America.....	4	3	3	1,050	2,111	2,271
Austria.....	15	-	-	-	21	1,285
Belgium and Luxembourg.....	-	-	-	-	4,244	2
Finland.....	-	-	-	b/	-	93
France.....	-	-	722	1	38	8,836
Germany.....	-	-	-	-	99	7,549
Greece.....	-	-	-	-	16	993
Iceland.....	-	-	b/	113	91	10
Italy.....	-	-	-	b/	132	-
Netherlands.....	-	-	600	1	1,256	4,423
Norway.....	-	-	-	1	3	7
Portugal.....	-	-	-	b/	151	85
Spain.....	-	-	-	-	-	20
Sweden.....	-	-	-	-	b/	11
Switzerland.....	1	-	-	-	-	54
United Kingdom.....	-	7	-	-	-	6
Republic of the Philippines	b/	b/	b/	120	146	520
Other Asia.....	-	-	311	16	130	1,337
Oceania.....	-	1	b/	12	28	39
Africa....	-	2	b/	98	876	1,860
Others.....	b/	-	-	3	-	1
Total.....	20	16	1,650	1,625	9,854	29,636

a/ Preliminary. b/ Less than 500.

Compiled from official sources.

SHARP DECLINE IN SYRIAN OLIVE OIL PRODUCTION

Syrian olive oil production declined precipitately during the 1948-49 season with the latest estimates placing the new crop at 9,000 to 10,000 short tons of oil compared to about 17,600 tons for the 1947-48 season. These production figures include both edible and inedible olive oil. The short 1948-49 olive crop was attributed mainly to the alternate bearing character of olive trees, lack of

adequate fertilization, and lack of care in harvesting.

Large stocks of surplus oil from the 1947-48 crop depressed the market during 1948, and profitable exportation became possible for the first time in December 1948 when the government liberalized its exchange-control regulations. During the first 6 months of 1948 only 41 tons of olive oil were exported from available surpluses estimated at 6,500 tons. Exports in 1947 totaled 930 tons.

CANADA REMOVES EXPORT AND IMPORT CONTROLS ON FATS AND OILS

Canadian controls on the export of fats, oils, vegetable oil seeds, and specified materials related thereto, have been removed except when such products are destined for certain European countries. Only butter remains under control according to the recent order effective February 17. Flaxseed, linseed oil and whale oil had been removed from export control as of 9 days earlier.

Control of imports of fats and oils of vegetable, animal and marine origin also was terminated on February 17.

The Canadian Government's removal of these controls followed closely the action of the International Emergency Food Committee in discontinuing the allocation of fats and oils effective February 10.

TROPICAL PRODUCTS

SMALLER GINGER AND PIMENTO CROPS FORECAST FOR JAMAICA

Ginger. The 1948-49 ginger crop in Jamaica is expected to be the smallest in many years. The crop now being harvested is forecast by trade sources at around 2.1 million pounds as compared with the 1947-48 crop of 3.1 million pounds and the 1946-47 crop of 3.4 million pounds, according to the American Consulate General in Jamaica.

Rising production costs, continued low ginger prices, and the Jamaican Government's encouragement of new plantings of bananas, and lower yields per acre caused by unfavorable weather conditions and soil depletion, are the most important factors in marked decline in production. Low prices and increasing costs have made ginger a relatively unprofitable crop for the typical small settler. Repeated planting on the same land has impoverished the soil in the principal producing area, and yields which used to average about 2,000 pounds of cured ginger per acre have dropped. The yield for the 1948-49 crop is estimated at 1,200 pounds per acre.

The period of planting and early growth in April and May 1948 was at the end of a long drought. When the rain came, it was too late and too much. The prolonged dry weather caused the roots to be small, and the heavy rain which followed caused a high percentage of rot. The harvest, which requires sunny weather for drying the ginger, has been interrupted by frequent showers. The Government and producer organizations are encouraging producers to replace ginger with bananas with a view to regaining Jamaica's position as a principal banana exporter. High prices and improved market outlets for bananas offer more security than the highly speculative ginger market.

Jamaica exported 3.1 million pounds of ginger in 1948 as compared with 3.4 million pounds in 1947 and 3.9 million pounds in 1946. Exports to the United States are mostly No. 3 quality for grinding. Trade sources estimate that grinding ginger will be sold for 18½ cents to 20 cents per pound, c.&f. The United Kingdom and Canada are the principal purchasers of the higher grades of ginger. It is expected that prices for the 1949 harvest will be considerably higher than in 1948. These higher prices will probably encourage the small settler to plant more ginger for the 1950 crop.

Pimento (Allspice). The American Consulate General in Jamaica reports a forecast of 3.0 million pounds of pimento in Jamaica for the 1948-49 crop (harvested from August to March), which represents a sharp decline from the 1947-48 production of nearly 6.0 million pounds.

This decline is attributed to the long drought in early 1948 and the heavy rains which started in May. The drought reduced the number of blossoms and the heavy rains destroyed many blossoms on the trees. Observers do not believe that there has been any further spread of the rust disease which in previous years destroyed large numbers of the trees.

Jamaica exported an estimated 5.0 million pounds of pimento in 1948 as compared with 3.2 million pounds in 1947 and 4.0 million pounds in 1946. Because of slumping world demand and the heavy crop in 1947-48, stocks have increased considerably. The Jamaican Department of Commerce and Industries reports carry-over stocks on December 31, 1948 of 7.7 million pounds.

BRAZIL'S 1948 CACAO

EXPORTS DOWN

A preliminary estimate of 160.9 million pounds of cacao beans exported in 1948 from Brazil shows a substantial decrease from the revised estimate of 218.4 million pounds exported in 1947, 1946 exports of 287.6 million pounds, and the prewar average of 264.0 million pounds.

BRAZIL: Exports of cacao beans by country of destination,
calendar year 1948 with comparisons

Destination	Average		1946	1947 ^{1/}	1948 ^{2/}
	1935-39	1940-44			
	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds
<u>The Americas</u>					
Canada	883	-	2,205	4,409	981
United States	187,586	195,500	168,334	143,751	120,266
Argentina	10,584	14,774	18,887	16,870	12,034
Chile	93	1,363	1,971	772	422
Colombia	2,385	720	750	1,190	265
Cuba	-	-	-	3,042	-
Surinam	-	94	15	-	-
Paraguay	-	-	20	13	-
Uruguay	1,191	1,737	2,919	893	1,212
Other	3	8	-	-	-
Total	202,725	214,196	195,101	170,940	135,180
<u>Europe</u>					
Belgium & Luxembourg	2,203	79	1,422	1,830	4,467
Denmark	2,235	19	4,409	2,028	-
Eire	-	314	1,400	2,240	1,790
Germany	27,491	2,866	-	-	-
Italy	9,263	3,158	14,070	2,694	2,625
Netherlands	9,068	1,449	58,091	18,847	4,776
Norway	1,748	251	3,307	2,205	-
Sweden	4,565	6,026	4,784	1,830	1,323
Switzerland	303	1,515	1,056	3,490	1,291
Other	3,756	2,796	2,999	6,187	8,511
Total	60,632	18,473	91,538	41,351	24,783
<u>Asia</u>	244	250	754	2,346	663
<u>Africa</u>	197	135	-	3,002	274
<u>Oceania</u>	182	55	220	710	-
Grand Total	263,980	233,109	287,613	218,349	160,900

^{1/} Revised estimates based on data released by the Brazilian Ministry of Finance. ^{2/} Preliminary estimates for the year based on data released by the Brazilian Ministry of Finance for the first 11 months.

Comercio Exterior do Brasil except as noted.

One of the principal reasons for the decline in exports is that production has shown a gradual downward trend over the past several years from a high of 321 million pounds for the 1946-47 crop year (May to April) down to 225 million pounds in 1947-48 and to a forecast of 218 million pounds in 1948-49. Another, and perhaps more important, reason for the smaller exports in 1948, was the sharp drop in prices of cacao beans during the latter part of the year from a high of around 42 cents per pound in August to less than 29 cents per pound in December, c.&f. New York. Exporters had purchased the bulk of the crop at high prices and many of them refused to sell after the drop. Consequently, the cacao market was almost completely inactive during the last 2 months of 1948.

The Commercial Director of the Bahia Cocoa Institute was reported to have advised the Institute to hold for higher prices. His expectation of a price recovery did not materialize. Instead, prices fell and stocks accumulated. Early in January, 1949, the price of cacao beans had dropped to about 23 cents per pound (c.&f. New York) and stocks available for export were estimated at around 95 million pounds.

On January 19, 1949, the President of the Bahia Cocoa Institute and cocoa exporters held a conference with the Governor of Bahia for the purpose of discussing the possibilities of persuading the Bank of Brazil to permit sales of cacao beans to European and other countries in the sterling area.

The President of the Cocoa Institute said he was also studying the possibilities of making sales by means of compensation, that is to say, exchanging cacao for articles or products that may interest the Bahia trade. He cited Czechoslovakia as being interested in exchanging machinery for cacao. He further stated that it was possible to do business with The Netherlands, Iceland, Poland, and Germany which have quotas fixed by the International Emergency Food Committee. Other suggestions were offered as to the measures necessary to find export markets for unsold cacao stocks in Brazil. Consideration was being given to the possibility of sending part of the cacao stocks to the United States on consignment.

LIVESTOCK AND ANIMAL PRODUCTS

DANISH HOG NUMBERS INCREASE SUBSTANTIALLY

All classes of Danish hogs showed substantial rise in numbers over a year earlier, according to the census of February 12, 1949. Suckling pigs and bred sows continued to make the largest gains, namely, 132 and 127 percent, respectively, and total hog numbers were more than 42 percent larger than a year ago. Prospects of larger feed supplies in the first half of 1948 and slightly better bacon prices were factors which influenced farmers to expand 1949 hog numbers. The larger number of hogs can be expected to reflect an increase in pork production and bacon exports in the latter part of this year and early in 1950.

Danish hog numbers by classes, according to the census data, were as follows, with comparable figures for February 1948, in parentheses: Bred sows 200,000 (88,000); total sows 285,000 (136,000); suckling pigs 509,000 (219,000); pigs and slaughter pigs 1,291,000 (1,107,000); and total hogs, including boars, 2,094,000 (1,469,000). (For other comparative data see Foreign Crops and Markets, February 14, 1949.)

BELGIAN LIVESTOCK NUMBERS, EXCEPT HORSES AND GOATS, INCREASE

Practically all species of livestock in Belgium at the beginning of this year showed a substantial increase in numbers, according to preliminary returns. Hog numbers reflected the largest gain of almost 41 percent over January of 1948. Milk cows were about 14 percent higher, while total cattle numbers were 6 percent larger. Sheep numbers also increased over last year, but horses and goats declined 8 and 3 percent, respectively.

The significant increases in livestock numbers reflect a generally improved feed situation and can be expected to step up indigenous meat production. As a result, particularly, of larger hog numbers, a larger domestic pork production toward the end of the year can be looked for which should tend to reduce meat import requirements at that time.

BELGIUM: Livestock numbers on January 1, 1949, with comparisons

Classification	: Average : : 1936-40 :	: 1947 :	: 1948 :	: Prelim. : 1949 :
	: Thousands :	: Thousands :	: Thousands :	: Thousands :
Cattle - total.....	1,724	1,652	1,588	1,688
milk cows only.....	956	803	757	820
Hogs.....	1,005	776	648	912
Sheep.....	187	144	107	113
Goats.....	158	74	56	54
Horses.....	254	304	288	265

1/ Year 1930.

Compiled from official sources.

COLOMBIA INCREASES BEEF CATTLE EXPORT QUOTA

The Ministry of Agriculture and Animal Industry and the Ministry of Commerce of Colombia have issued a joint resolution which establishes the export quota of beef cattle at 25,000 head for the first half of 1949. This quantity represents the estimated surplus of cattle available from the Departments of Bolivar and Magdalena and the territory of Arauca, according to a late report.

The 1949 quota represents an increase from previous years, as 22,000 head were exported in 1947 and the quota of 30,500 head was set for 1948. These cattle are to be shipped to Venezuela, Aruba and Curacao, Panama and Trinidad.

L A T E N E W S

Latest estimates place the 1948 hops crop in Czechoslovakia at 97,233 centners (10,720,200 pounds), a substantial reduction compared with last November's estimate of 110,000 centners (12,125,000 pounds). Before the war, Czechoslovakia produced around 21,000,000 pounds of hops annually. Before the war, Czechoslovakia produced around 21,000,000 pounds of hops annually. By producing areas, the 1948 crop is reported in centners (110.23 pounds) as follows: Zatec (Saaz), 77,003; Ustek-Duba, 12,564; Roudnice, 7,023 and Trsice, 643.

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Cotton export licenses issued by the Pakistan Government with expiration date on February 28 will be revalidated to authorize shipments made on or before March 31.

With regard to exports to India, however, the authorization relates only to cotton purchased prior to March 1. This apparently means that approximately 100,000 Pakistan bales (83,000 bales of 500 pounds) formerly allocated for export to India will be released for export to other countries. Exporters in Pakistan holding allocations for export of cotton to India were able to purchase only about 200,000 of the 399,467 Pakistan bales allocated for export to India during the shipping period ended February 28. (For details see Foreign Crops and Markets, February 21, 1949 page 158).

The second official estimate placed the 1948-49 Pakistan cotton acreage at 2,853,000 and the final 1947-48 estimate of 3,122,000 acres. Private estimates of the 1948-49 crop average about 1,000,000 Pakistan bales compared with 1,110,000 in 1947-48. The condition of the crop this year is reported as below normal.

